



**AUGMENTING CUSTOMER
EXPERIENCE
WITH EFFICIENT, AUTOMATED
INCOMING E-MAIL QUERY
PROCESSING**

Client Background

The customer is the consumer unit of a Fortune 500 financial services company. Headquartered in New York, the customer operates from over 2500 branches catering to clients across 19 nations.

Engagement Story

The goal was to quickly build a reliable, automated system to efficiently process incoming e-mail requests and reinforce authentication

The internationally acclaimed financial institution with operations across the globe struggled to handle an exponential spurt in the volume of e-mails received in a particular department.

The sudden disruption caused by the unexpected increase in email volume triggered a spillover effect. This resulted in a visible dip in employees' productivity and quality of work, consequently affecting the customer experience.

The need to reinforce the existing authentication process was yet another concern that had to be addressed. Overall, the objective was to quickly establish a robust automation set up to handle the processing of incoming e-mail queries efficiently.

At first contact, the organization expressed the need for an automated system to help with the challenge of handling the massive increase of incoming e-mails and their authentication concerns.

After carefully assessing the situation, EvonSys recommended a Pega-powered system that could send automated e-mail notifications to customers using predefined e-mail forms such as an intelligent shape or activity on a case. When someone replies to the notification, it goes through a bot and gets processed completely. However, the system must also include the e-mail account used for sending e-mails to reply to any notifications received by the system with an automated e-mail bot.

The proposed system was envisaged to assist customer service representatives (CSRs) in handling all relevant customer and other stakeholder information without switching between screens, consequently boosting productivity and saving time. The Pega-powered e-mail channel could also handle customer responses with automatic e-mail notifications for related cases.

Key Business Challenges

The customer runs operations across 2500 branches spread out in 19 countries. The critical challenge was for an organization of such scale to handle erratic fluctuations in the volume of incoming e-mails with the available workforce in the concerned department. Over time, the significant climb in the number of incoming e-mails meant that the organization had to look for a more sustainable approach that could assure a promised response time with high levels of accuracy. The delay in responses was beginning to affect the organization's reputation that it had steadily built in the past two centuries. The two primary challenges the organization aimed to resolve were

- Difficulty in handling the incoming e-mail volume.
- Integrating with Vanguard and Grace for authentication purposes.

Desired Goals

The customer primarily wanted a system that could automate the e-mail handling process. A query initiated by the end customer over an e-mail interface would reach the department, where an effective response within an assured timeline would provide an efficient resolution. EvonSys and the customer worked together to define the various objectives needed to accomplish the overarching goal. Some of the objectives defined were:

- Automating the incoming e-mail routing mechanism by creating an Interaction.
- Authenticating the user using e-mail over Grace call.
- Auto-routing the client e-mail interaction to respective teams based on the NLP extraction mechanism
- Automating the client notification from the system.
- Reducing the overall interaction time by e-mail automation.

EvonSys Solution

The team at EvonSys carried out several activities to achieve the desired goal. Some of the tasks that involved low code expertise in a Pega environment

- Automating the client e-mail interactions that captured the system's end-to-end flow inside the manual outlook approach.
- Efficiently utilized Pega e-mail channel and e-mail listeners to automate the conversion of incoming e-mail into an Interaction case.
- Automating the auto-routing based on NLP (Natural Language Processing) model.
- Leveraging Pega OOTB features like SLA and agents to send client notifications.
- Efficiently utilizing service rules to connect the external Systems (Grace and Vanguard teams) for client authentication and verification process.

The Evonsys Development team was able to develop the entire feature quickly, thanks to the advanced logical code built into their work process. This included sprints, which acted as milestones and helped organize and complete work.

The team at EvonSys collaborated with several other groups to develop their final solution successfully. These include NLP, Grace, and Vanguard.

Certified QAs from Evonsys tested the application with innovative testing techniques and processes.

" The EvonSys development team delivered the project in an incredibly brief period, thanks to their advanced logical coding process that is a part of their approach. They used sprints to help organize their work and keep them on track. "

Business Value

The customer enjoys business value derived from the following features that EvonSys incorporated in the newly developed e-mail interface system:

- A measurable boost in the productivity of the employees
- The automation of e-mails significantly reduced the turnaround time.
- The inbuilt client notification feature for end users helped improve customer experience.

ASK US ABOUT THE EVOLVE WORK SHOP

CONTACT OUR TEAM.

We'd love to help you.

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